

Budget Amendment Tip Sheet

1. When to initiate a Budget Amendment:

- If there are changes in your grant funded staff.
- There is a need to transfer funds into or out of any cost category, or to move monies into a budget category with a zero dollar amount.
 - For example, if the cost category “Travel” did not exist in the original budget, the adjustment to transfer funds from Equipment to Travel requires a budget amendment.
- There is a need to adjust the approved match.

2. What to submit for a budget amendment:

- A copy of the proposed budget amendment on the FY18 budget worksheet, or as directed otherwise by your Grant Program Specialist
- A narrative describing the reason for the amendment request and the changes proposed
- If staff changes are proposed, include a programmatic change form, with required staff information (i.e. hours increasing/decreasing; pay increasing/decreasing; new staff hired; resignation, etc.)
 - Programmatic changes must have BOTH a programmatic and fiscal signature.

3. Helpful Notes:

- It is highly encouraged that you contact your Grants Program Specialist *before* submitting a budget amendment to ensure appropriate backup is provided upfront.
- You may shift up to only 10% of the total program budget between cost categories per fiscal year.
 - Any shift MUST be pre-approved by your Grants Program Specialist.
- It is important that budget amendments are submitted BEFORE expenditure reports (invoices) are sent in.
 - Costs may not be approved for payment if budget amendments are sent in AFTER an expenditure report is submitted.
- There are no special forms for budget amendments, please use the FY18 budget worksheet.